

Fig. 1

37

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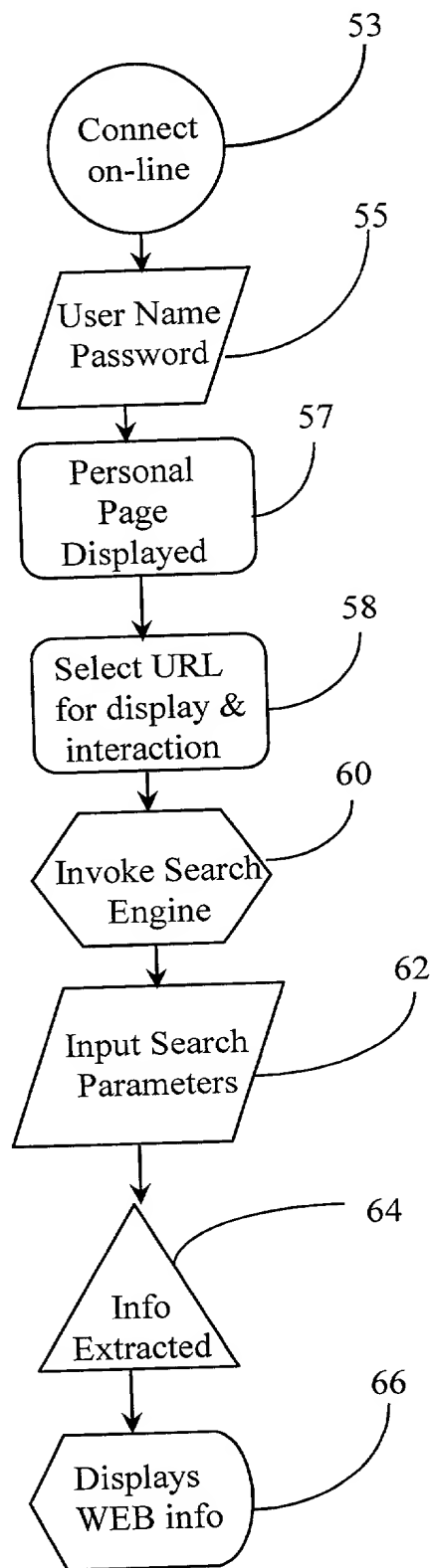
Internet Portal.com (personalized page)

| Search | Server Name     | User Name     | Password   |
|--------|-----------------|---------------|------------|
| Agent  | LBC.com         | John Doe      | XXXXXXX    |
| Last   | My Bank.com     | John R. Doe   | XXXXXX     |
| Update | My Stocks.com   | John R. Doe   | XXXXXXXXXX |
| ADD    | My Shopping.com | Jane L. Doe   | XXXXXXXXXX |
|        | Mortgage.Com    | John/Jane Doe | XXXXXXXXXX |
|        | Airline.com     | John Doe      | XXXXXXX    |

Search String  51

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Fig. 2



**Fig. 3**

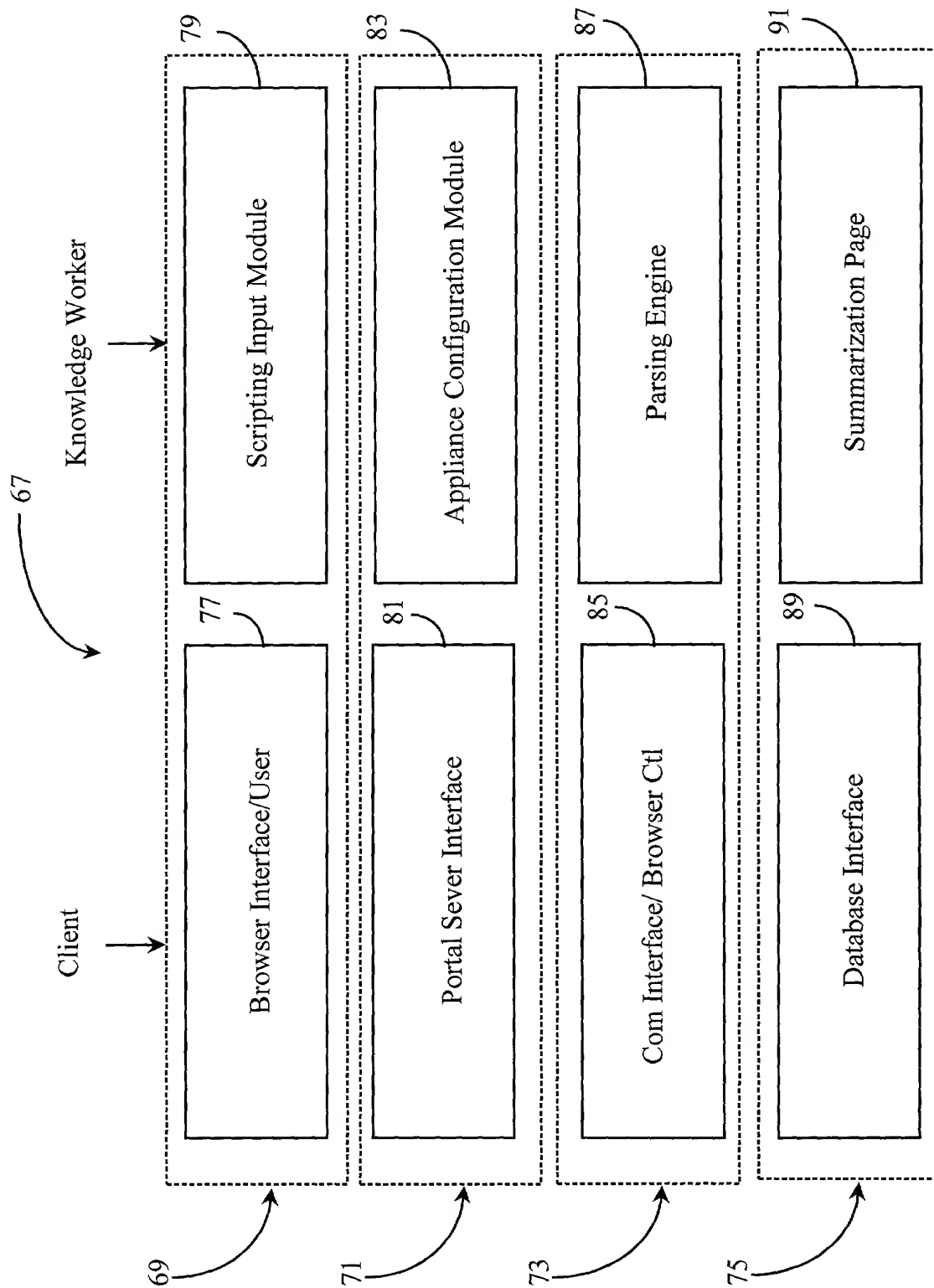
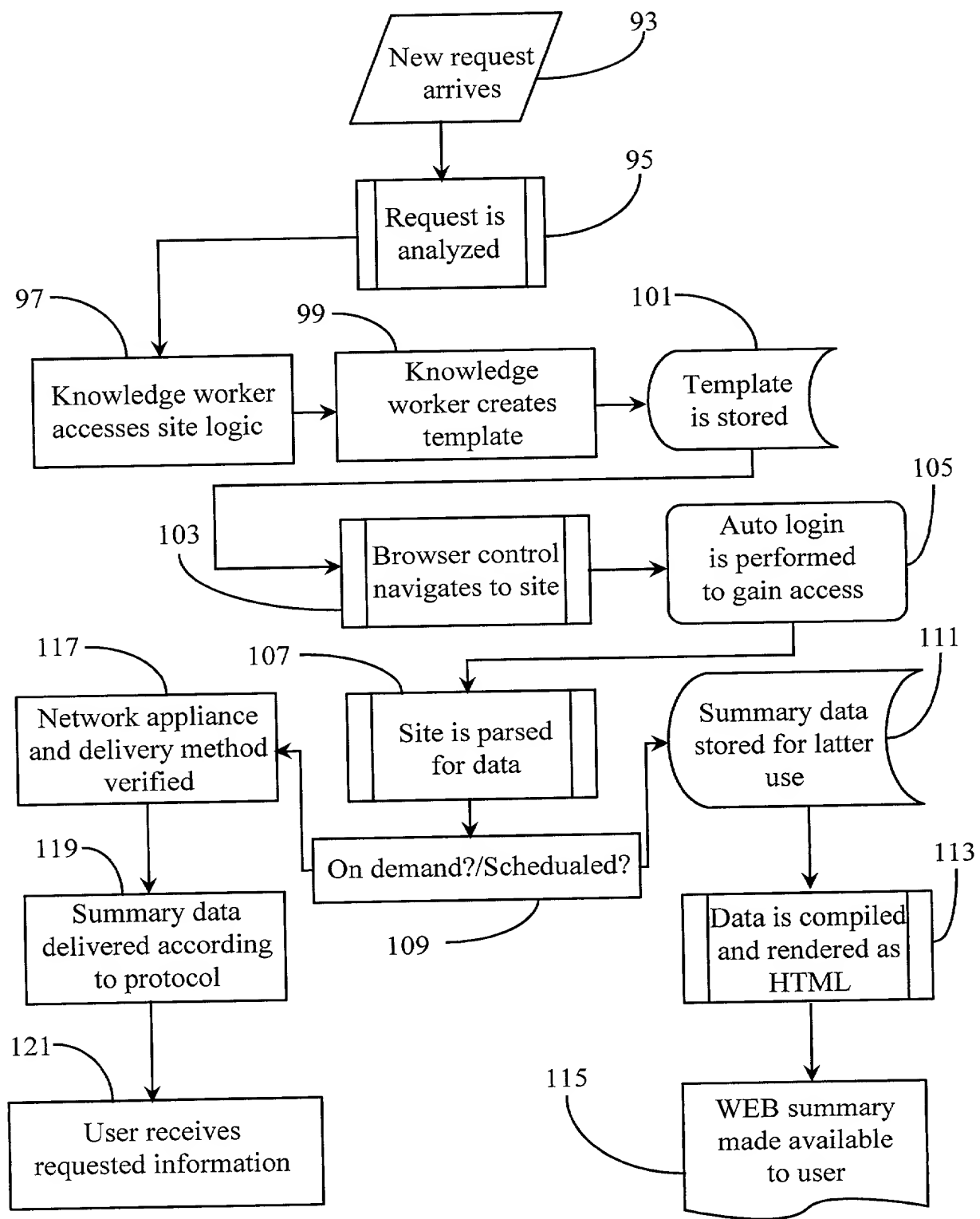
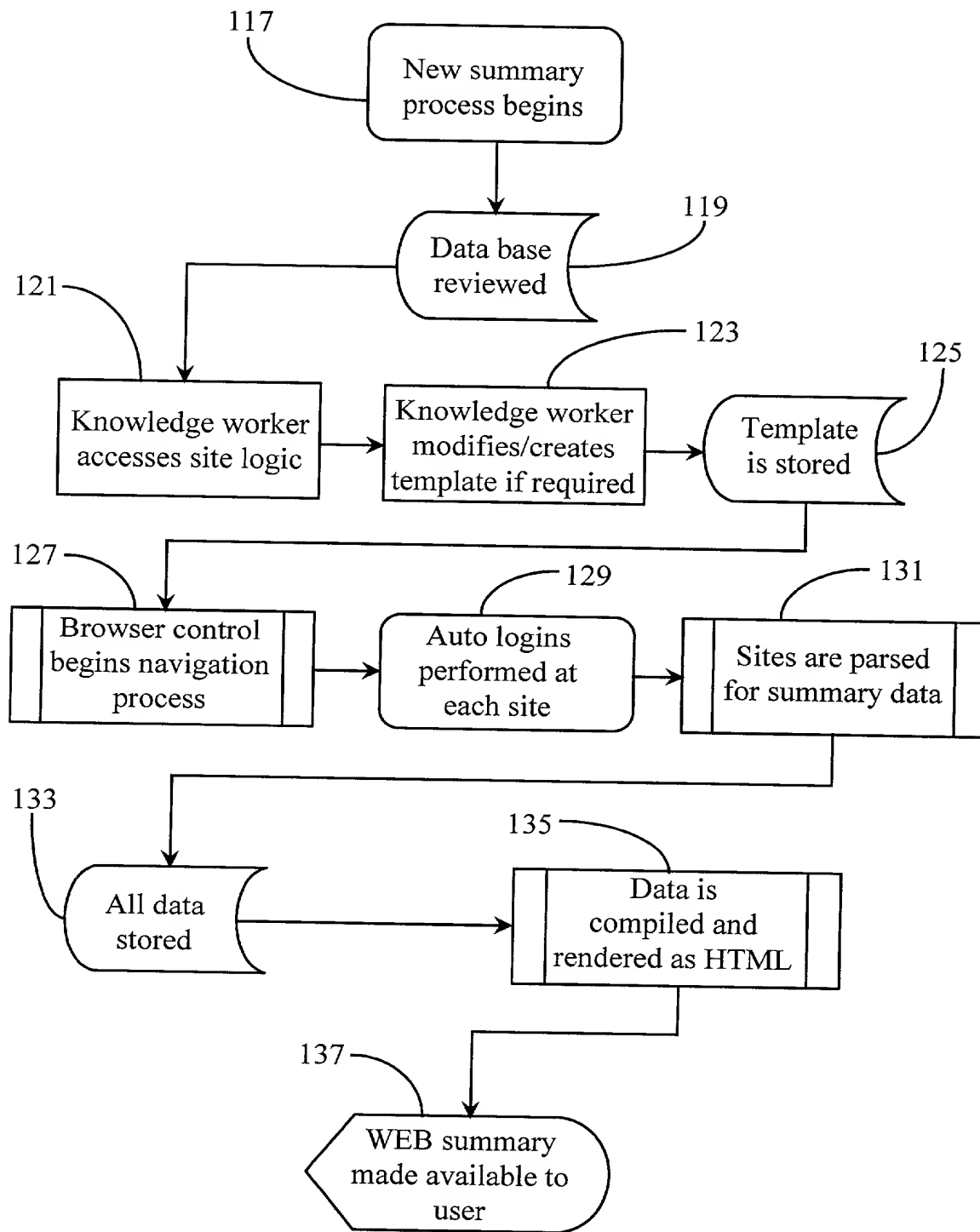


Fig. 4



**Fig. 5**



**Fig. 6**

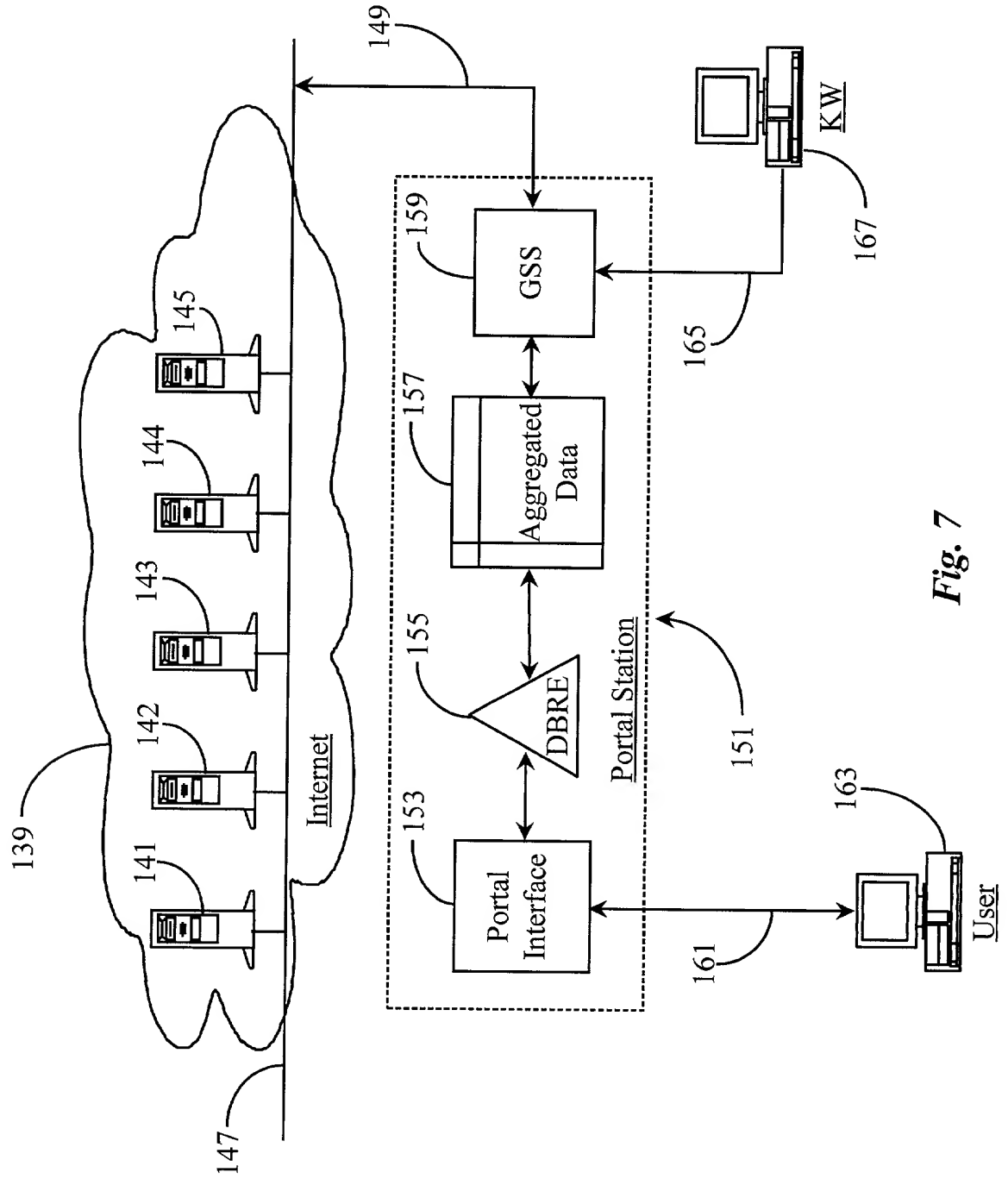


Fig. 7

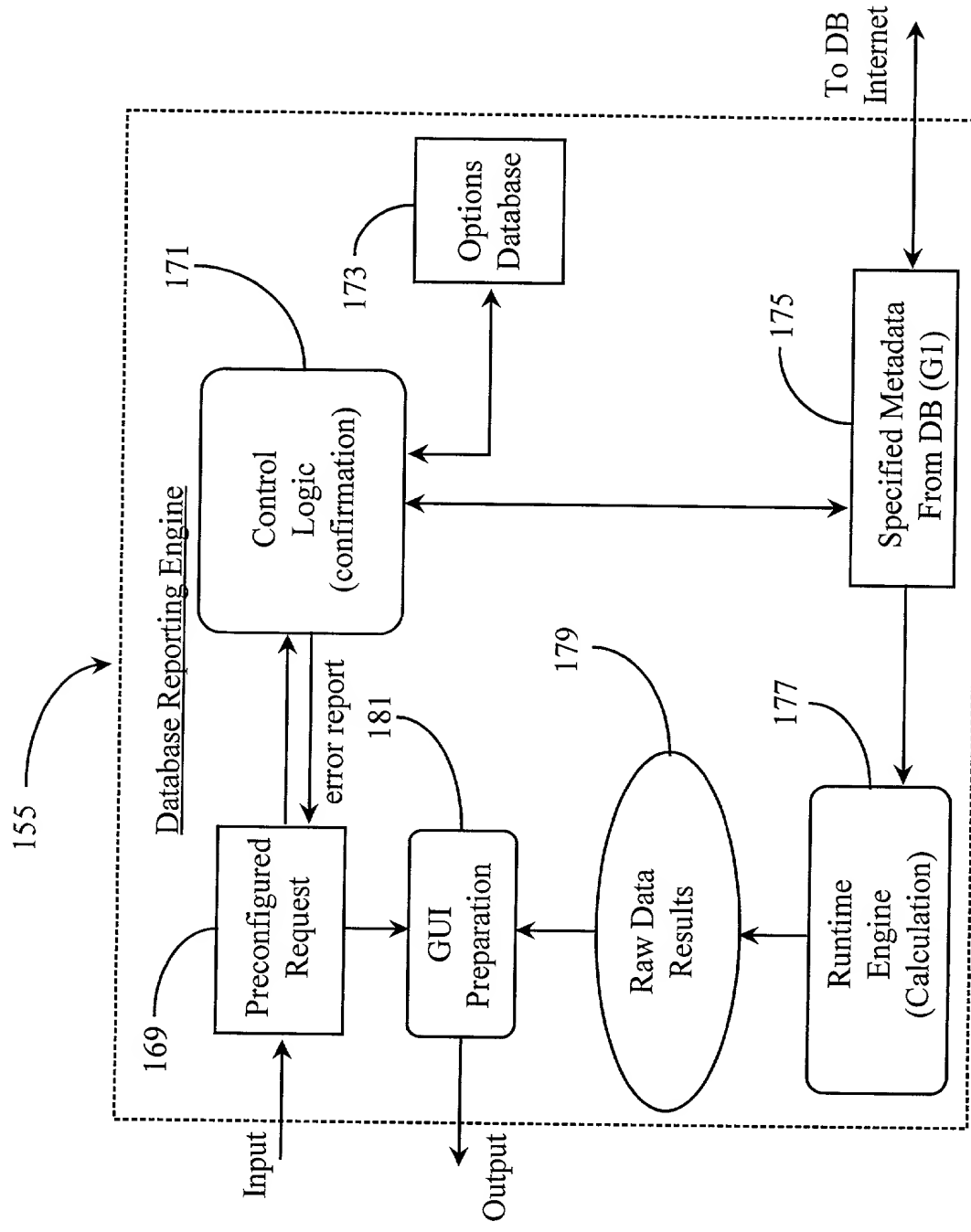
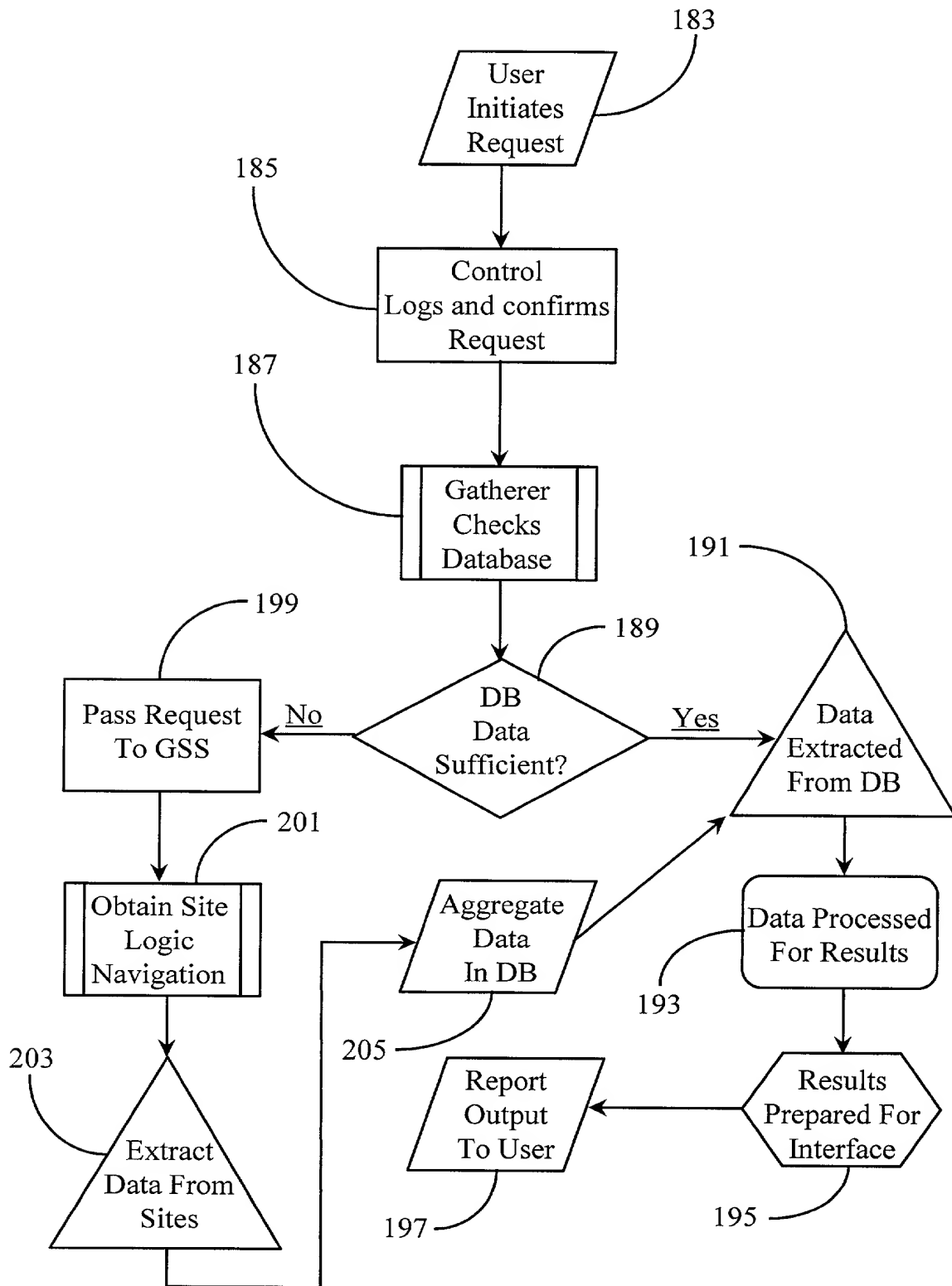


Fig. 8





**Fig. 9**

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Personal's Yodlee - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Related

Address: [http://sunserver.20000/magic/login?int\\_anchor=b174&int\\_tab\\_id=45&int\\_174b](http://sunserver.20000/magic/login?int_anchor=b174&int_tab_id=45&int_174b)

**Banks**

Standard Federal Credit Union

| Account     | Balance |
|-------------|---------|
| Savings - 1 | 0.15    |

Last Refresh: 8 days ago - Refresh

Wells Fargo

| Account  | Balance  |
|----------|----------|
| CHECKING | 34973.92 |
| CHECKING | 35457.68 |
| MRA      | 40779.89 |
| SAVINGS  | 101.60   |

Last Refresh: 8 days ago - Refresh

Bank Summary

| Summary       | Amount    |
|---------------|-----------|
| TOTAL BALANCE | 111313.24 |

**Investments**

Datsek Online

| Symbol                | Quote   | Quantity | \$ Change |
|-----------------------|---------|----------|-----------|
| CSCO                  | 69      | 1        | - 3/8     |
| HLIT                  | 112 3/8 | 1        | -4 5/16   |
| portfolio_balance     |         |          | N/A       |
| Total Account Balance |         |          | 2029.55   |

Last Refresh: 2 hrs ago - Refresh

Investment Summary

| Summary             | Amount  |
|---------------------|---------|
| TOTAL STOCK BALANCE | 181.375 |
| TOTAL ACCOUNT VALUE | 2029.55 |

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Fig. 10

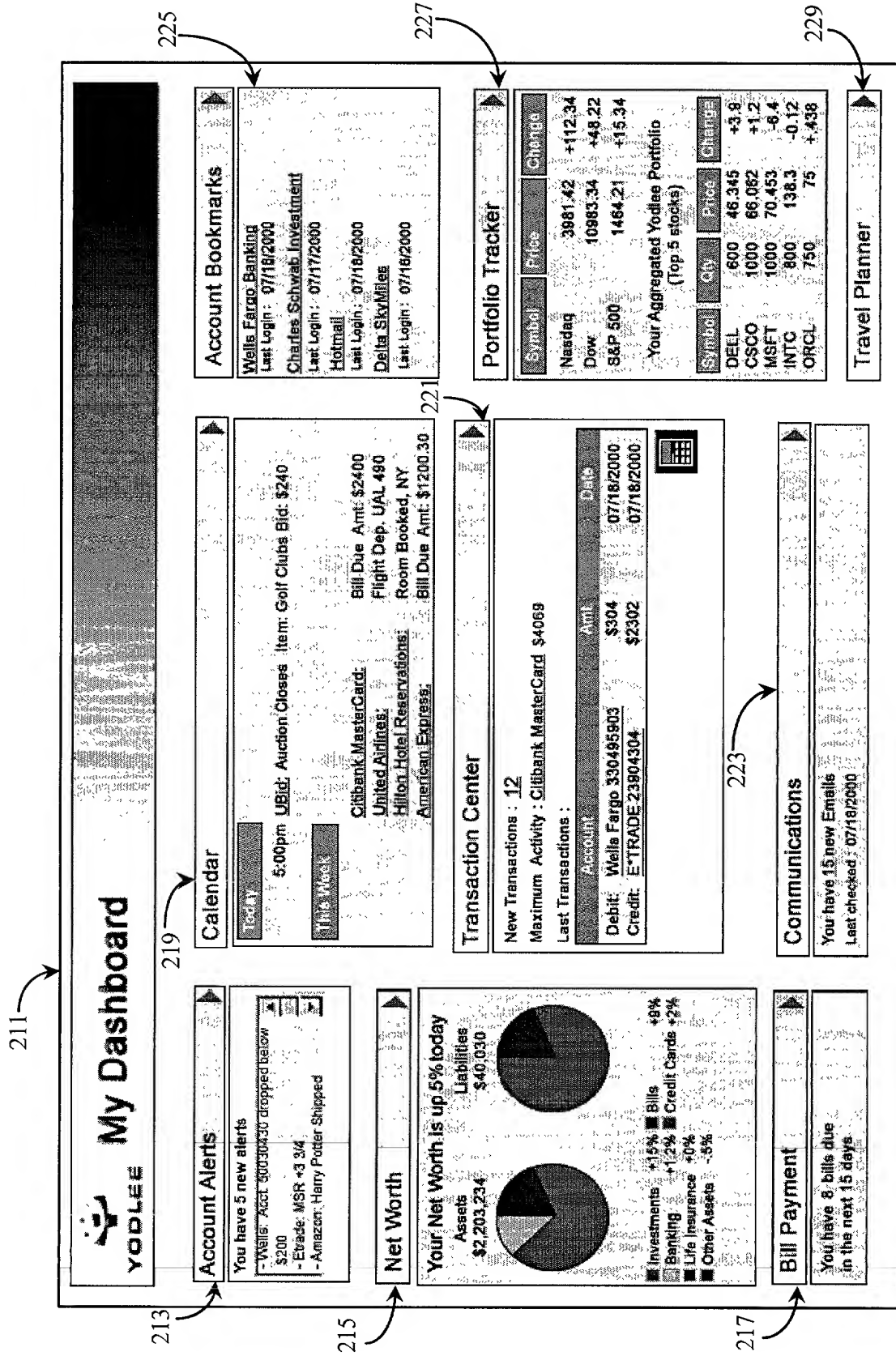


Fig. 11

**YODLEE My Dashboard**

**YODLEE CALENDAR**

DAY WEEK MONTH YEAR

◀ **JULY 2000** ▶

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
| 25 | 26 | 27 | 28 | 29 | 30 | 1  |
| 2  | 3  | 4  | 5  | 6  | 7  | 8  |
| 9  | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | 31 | 1  | 2  | 3  | 4  | 5  |

Today is July 18th, 2000

**Add**

**Show**

☒ Auctions  
☒ Shopping  
☒ Travel  
☒ Bills  
☐ Banking  
☒ Credit Cards  
☒ Investments

**JULY 18 - 24, 2000** 233 Print

Tuesday July 18th  
 5:00pm **LEld: Auction Closing - Item: Golf Clubs HighBid: \$240**

Wednesday July 19th  
 6:00am **United Airlines: Flight Departure - Flight # UAL490 Departing SFO**  
 10:00am **Hilton Hotel Reservations: Room Booked - New York Hilton, Single Room**

Thursday July 20th  
 All Day **CalBank MasterCard: Bill Due - Amt. \$2400**

Friday July 21st  
 8:00am - 9:00am **Fee Time - Silver Vista Golf Club. Call Jim.**

Saturday July 22nd  
 All Day **Amazon.com: Back Order 1205043 Due to ship - Item. Harry Potter Price: \$20**  
 All Day **Pacific Bell: Bill Due - Amt. \$100**

Sunday July 23rd  
 All Day **PG&E: Bill Due - Amt. \$100.34**

Monday July 24th  
 All Day **American Express: Bill Due - Amt. \$1200.30**

Click on an Account to log in

Fig. 12

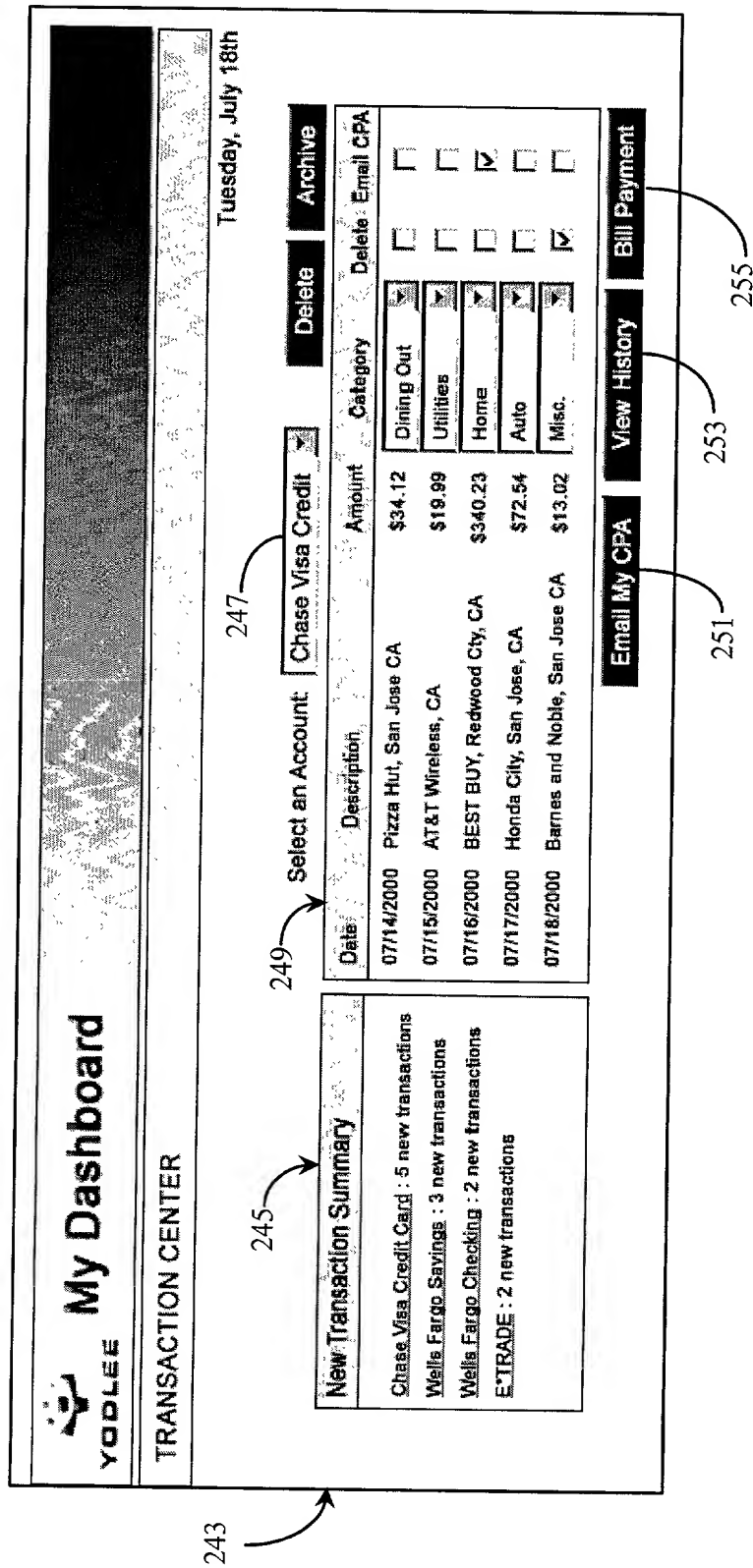


Fig. 13

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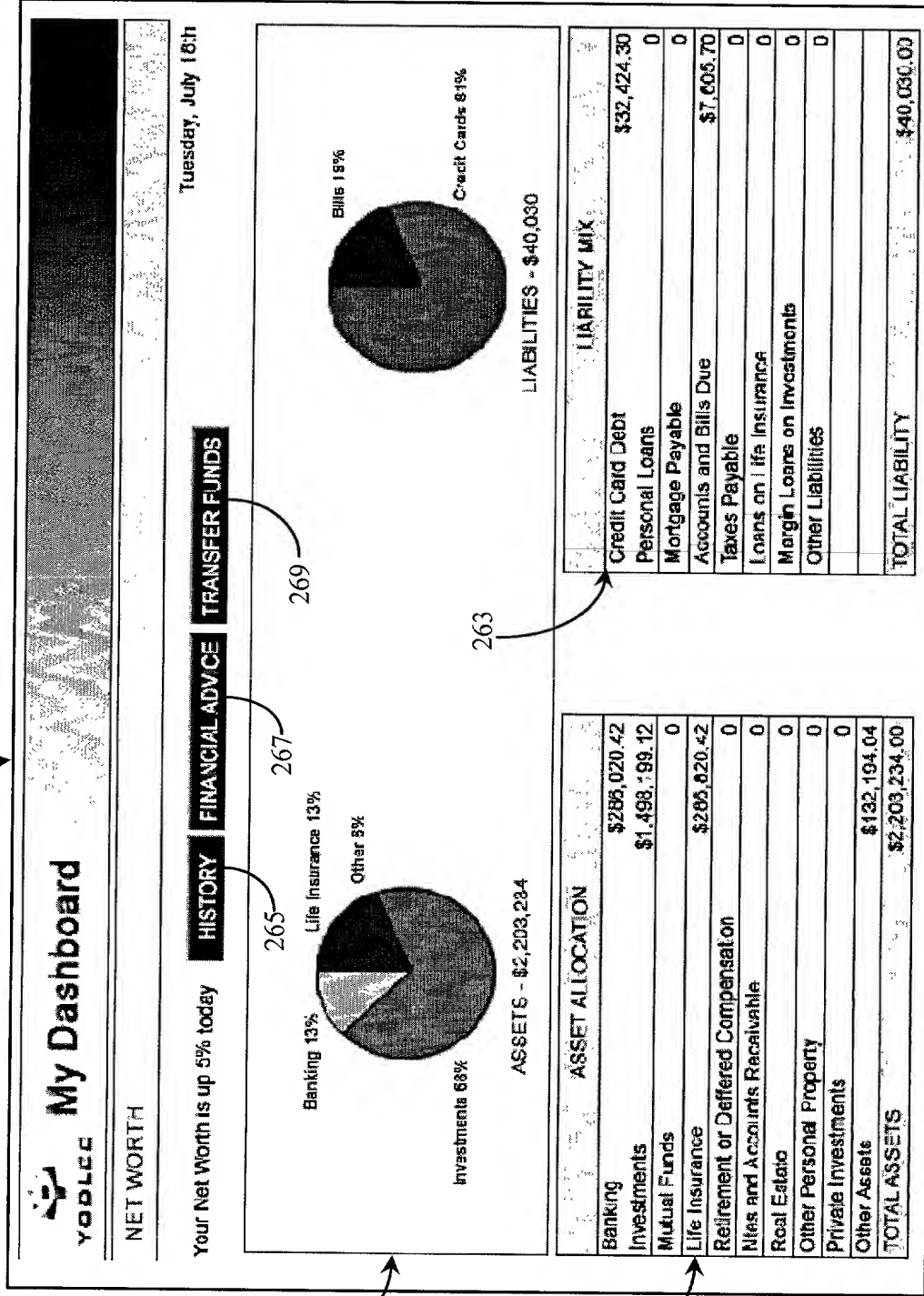


Fig. 14

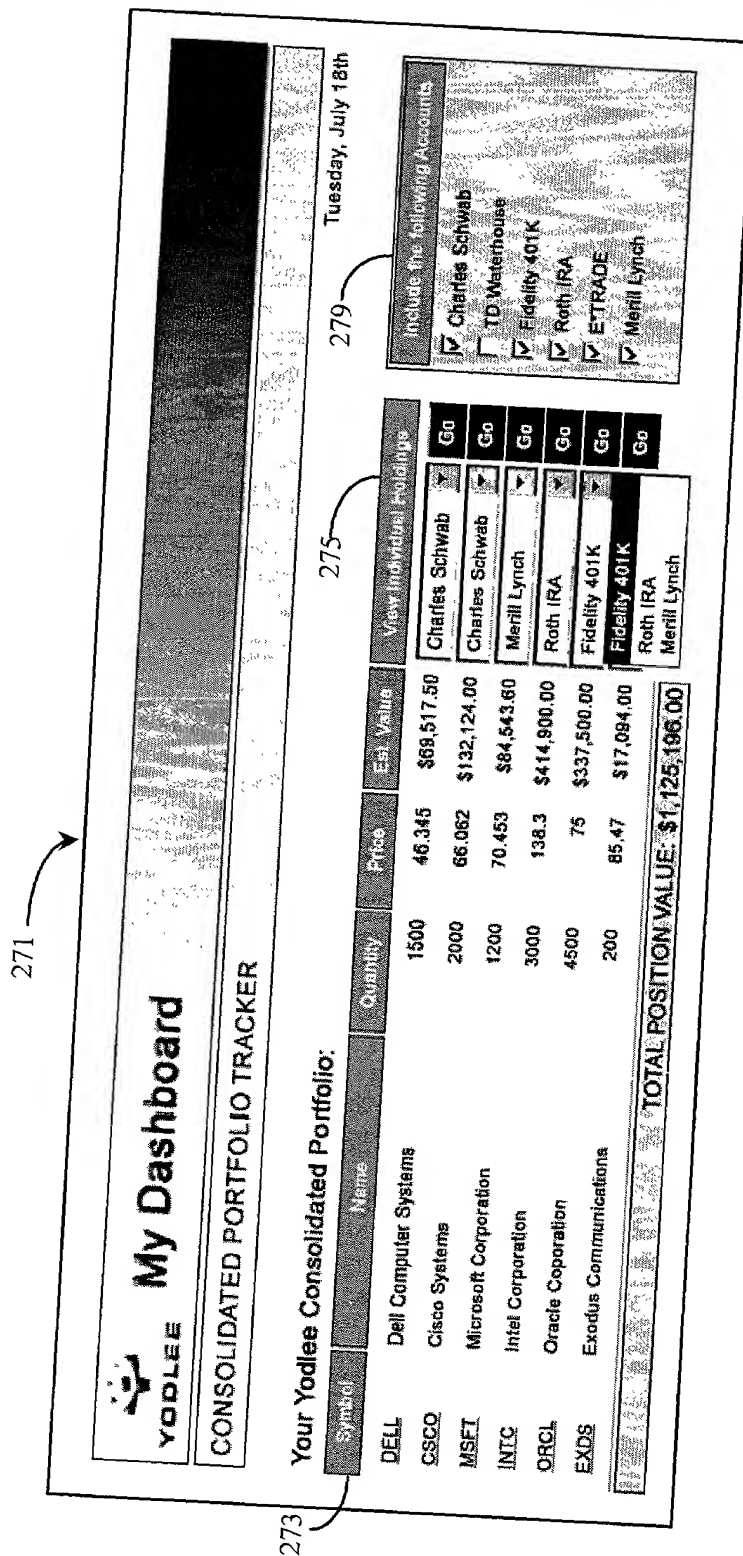


Fig. 15

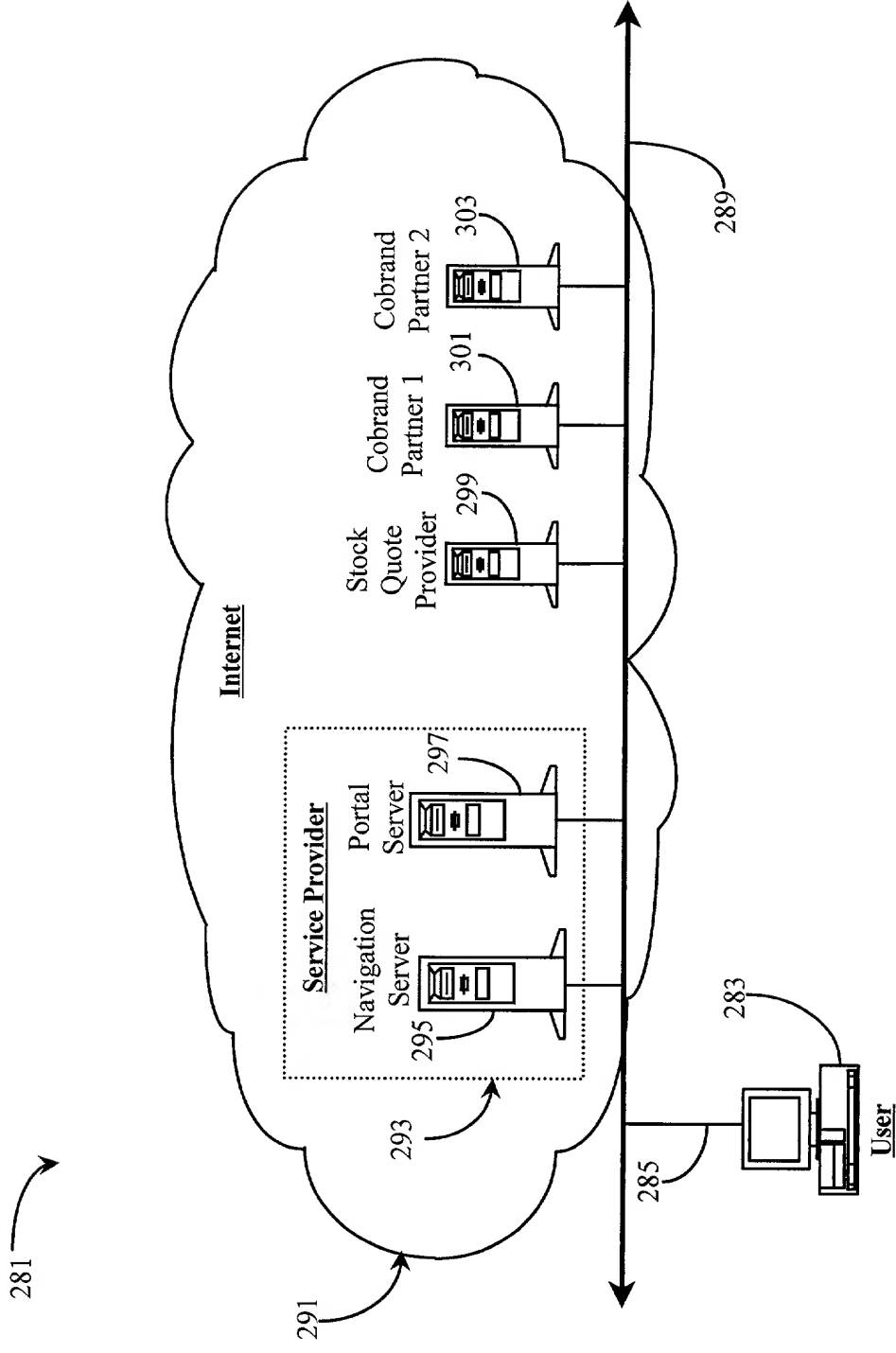
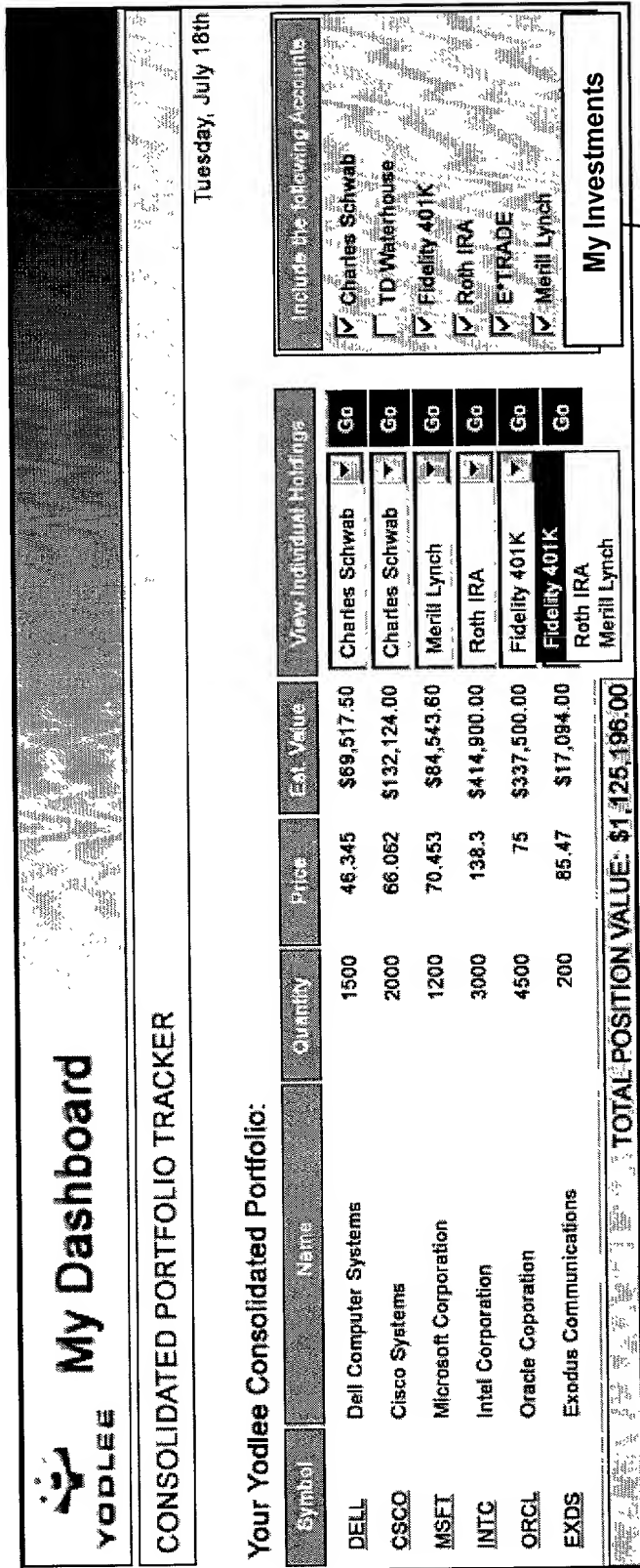


Fig. 16







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Portfolio Tracker

Fig. 18

# My Investments

| My Investments                                       |          |         |       |           | Print            |
|--|----------|---------|-------|-----------|------------------|
| Symbol   | Quantity | Price   | as of | \$ Change | Calculated Value |
| AOL  | 100      | 53.000  | 12:34 | +1.50     | 5,300.00         |
| EMC  | --       | 92.125  | --    | -1.75     | --               |
| FMAGX  | 50       | 138.660 | 10/09 | + .25     | 6,933.00         |
| MSFT   | 50       | 72.190  | 12:35 | + .15     | 3,609.38         |
| Cash   | --       | --      | --    | --        | 2,375.12         |
| Total Value  |          |         |       |           | 18,217.50        |
| Price, as of and \$ Change provided by S&P Comstock. |          |         |       |           | Get Quote        |

315

317

Fig. 19

### View Investment Account

Select Investment Account

You have shares of INTC in more than one account.  
Select the account you would like to view.

☒ Charles Schwab  
☐ Paine Webber  
☐ E\*Trade

Cancel

OK

319

Fig. 20

## Select Securities

### Select Securities

Select the investment accounts you want to track in your portfolio.

- ☒ Charles Schwab
- ☒ Paine Webber
- ☒ E\*Trade

Don't see your brokerage account?

[Add a New Account](#)

Select the indices you want to track in your portfolio.

- ☒ Dow Jones Industrial Average
- ☒ NASDAQ Composite
- ☒ S&P 500

Enter symbols for other stocks and funds you want to track, separated by commas.

EMC

[Cancel](#)

[Update Portfolio Now](#)

**Fig. 21**

## Portfolio Set Up

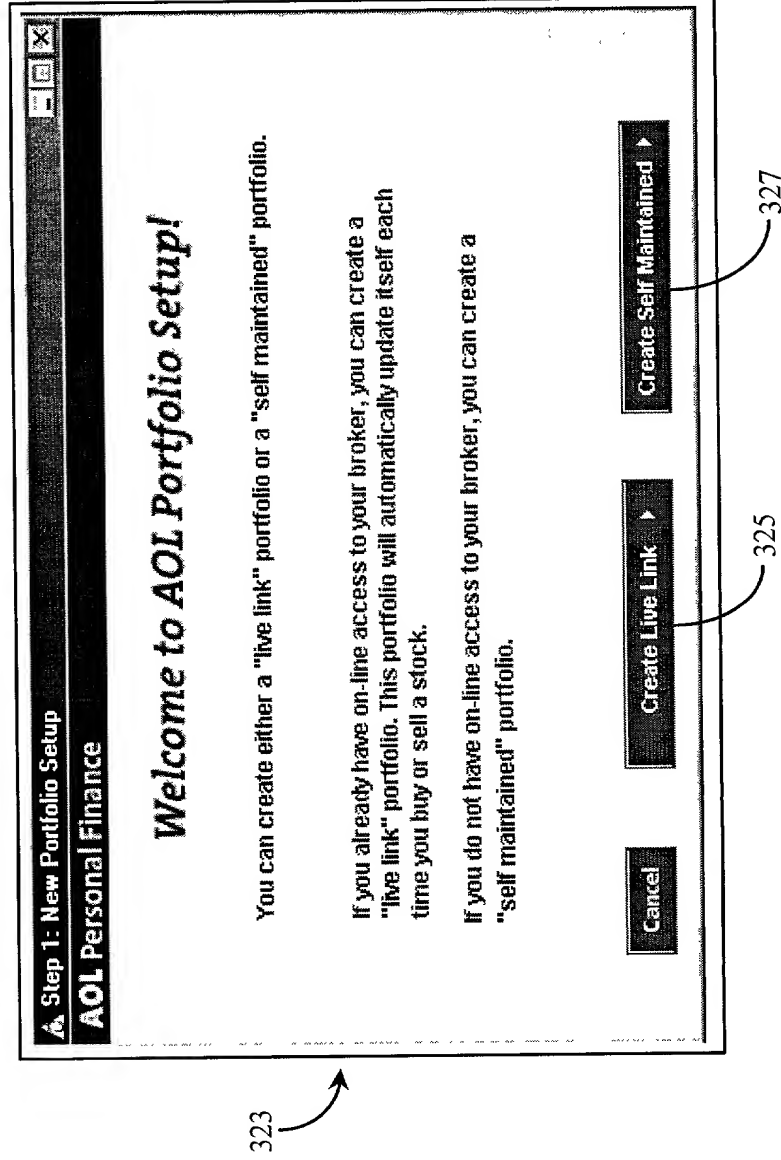


Fig. 22

# Portfolio Main

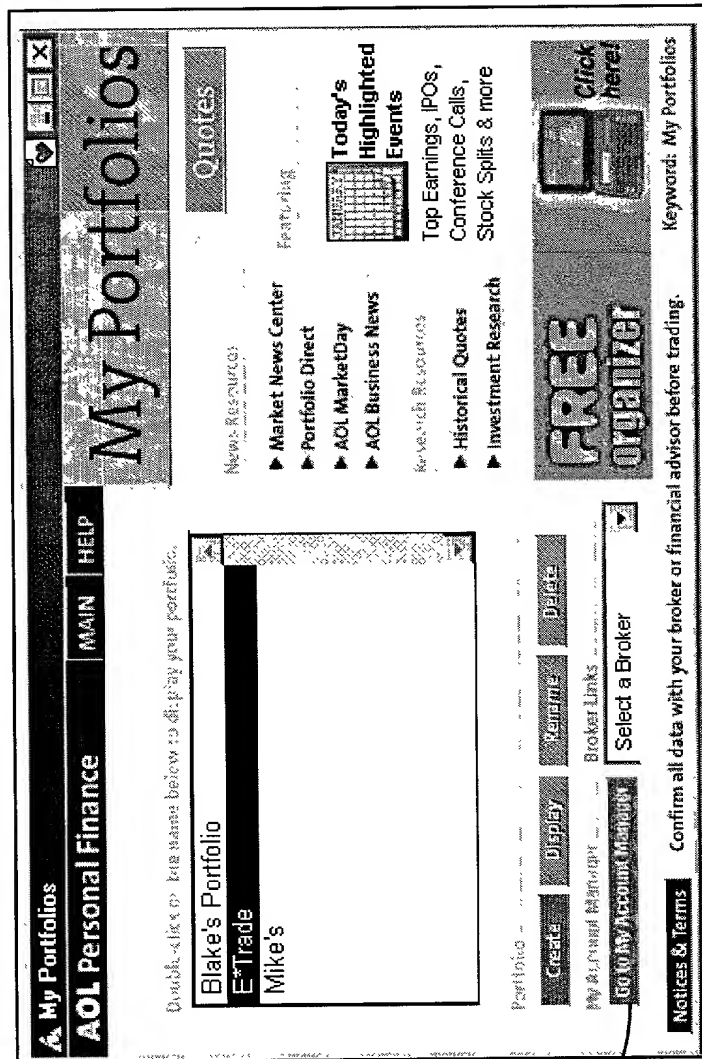


Fig. 23

## Portfolio Display

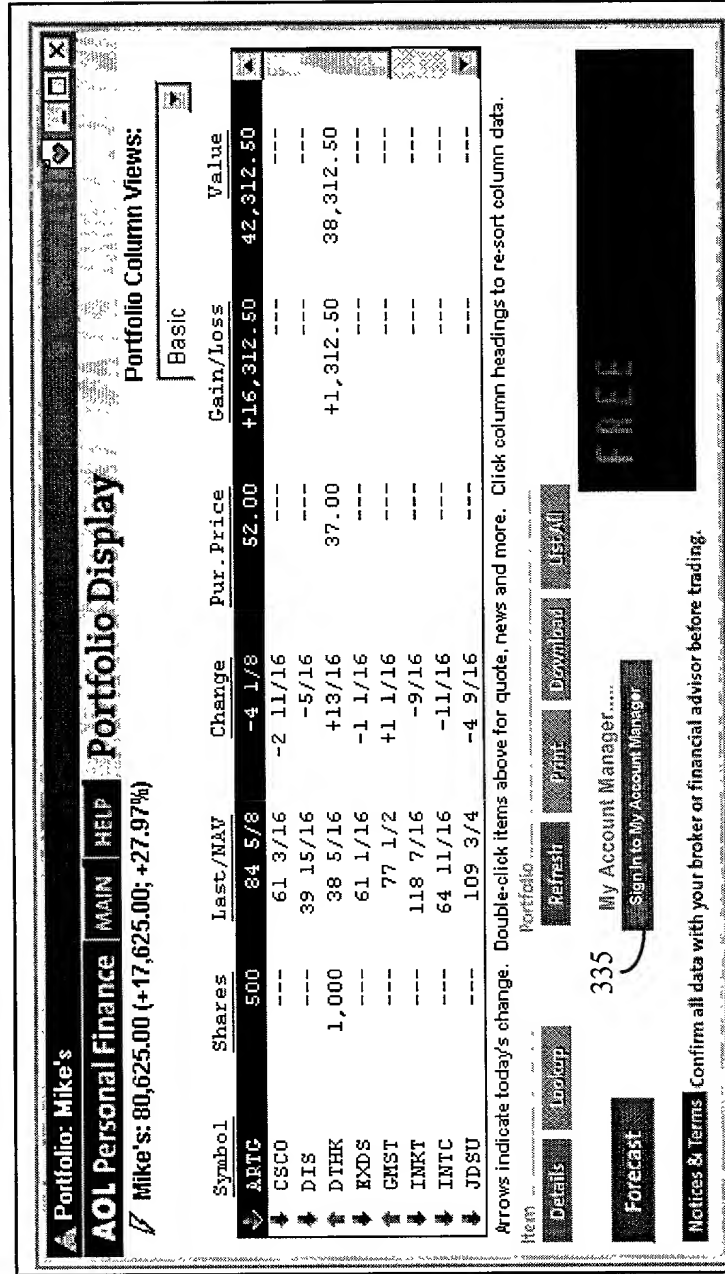


Fig. 24